

## Contact Management Quick Start Guide

Contact Management is a collection of Agencies and Individuals' name, address and contact data. Every system user is also an Individual in Contact Management. Individuals can be associated with Agencies. An additional feature is Groups. Groups can be built for associating like Agencies and Individuals (and sub groups) into 1 grouping. This can be beneficial for mailings.

### AGENCY

#### Adding an Agency:

From the **Main Menu**, click the **Contacts** tab on the main menu. You will be transferred to the **Individuals Search** page.

The screenshot shows the Egrants system interface. At the top, there's a header with the Egrants logo, Indiana Criminal Justice Institute logo, and a system clock. Below the header is a navigation bar with tabs: User Management, Funding Announcement, Project Management, Portfolio Management, Work Manager, Audits, Maintenance, **Contacts**, Reporting, and External Menu. Under the Contacts tab, there are links for Agencies, Individuals, Groups, and Extracts. The main content area is titled 'INDIVIDUALS SEARCH'. It contains a 'Search Criteria' section with input fields for Last Name, First Name, Title, City, State (dropdown), County (dropdown), ZIP Code, and Status (dropdown). There is a 'Search' button. Below the search criteria is an 'Add New Individual' button. At the bottom, there's a table header with columns: First Name, Last Name, Title, City, and County. A footer note says 'Please send technical comments and problems to ICI. EGRANTS Support. ©2011 Indiana Criminal Justice Institute. All rights reserved. Unauthorized Access Prohibited.'

Click on the **Agencies** button. You will be transferred to the **Agencies Search** page. Perform the 'Search for an Agency' steps listed below. Before adding an agency you must complete a search before you will have access to the 'Add New Agency' button.

The screenshot shows the Egrants system interface, similar to the previous one, but with the 'Agencies' link selected under the 'Contacts' tab. The main content area is titled 'AGENCIES SEARCH'. It contains a 'Search Criteria' section with input fields for Agency Name, Street Address, City, State (dropdown), County (dropdown), ZIP Code, and Agency Cleared? (dropdown). There is a 'Search' button. Below the search criteria is an 'Add New Agency' button. At the bottom, there's a table header with columns: Agency Name, Address Type, Street Address, City, Zip Code, and County. A footer note says 'Please send technical comments and problems to ICI. EGRANTS Support. ©2011 Indiana Criminal Justice Institute. All rights reserved. Unauthorized Access Prohibited.'

Click the **Add New Agency** button. You will be transferred to the **Agencies Details** page.

The screenshot shows the 'AGENCY DETAILS' page in the Egrants system. At the top, there is a navigation bar with links like 'User Management', 'Funding Announcement', 'Project Management', 'Portfolio Management', 'Work Manager', 'Audits', 'Maintenance', 'Contacts', 'Reporting', and 'External Menu'. Below this is a 'Logoff' button. The main form area is titled 'AGENCY DETAILS' and contains several input fields and buttons. The 'Agency Name' field is marked with an asterisk, indicating it is required. Other fields include 'Eligible to Apply for Grants' (checkbox), 'Federal ID Number', 'Preferred Contact Method' (dropdown menu), 'Agency Type' (dropdown menu), 'DUNS Number', 'Faith Based Agency' (checkbox), 'JURIS Number', 'ORI Number', 'Funding Agency' (checkbox), 'Email Address', 'Fiscal Year Ending (last day of)' (dropdown menu), 'Agency Cleared?' (checkbox), and 'US Congressional District' (text field with a hint '(Ex: PA02)'). There are buttons for 'Process As Duplicate', 'View History', 'Save', 'Delete', and 'Cancel'. Below the main form, there is an 'Add New Address' button, followed by an 'Address List' section with an 'Add Phone Number' button. The 'Telephone Number Listing' section has a table with columns 'Location', 'Phone Number', and 'Extension'. Below that is a 'Documents Received List' section with an 'Add New Document' button and a table with columns 'Action', 'Type', 'Valid From Date', 'Valid To Date', and 'Filed w/ Grant ID'. At the bottom, there are buttons for 'Process As Duplicate', 'View History', 'Save', 'Delete', and 'Cancel'. A footer note says 'Please send technical comments and problems to ICJ EGRANTS Support' and '©2011 Indiana Criminal Justice Institute. All rights reserved. Unauthorized Access Prohibited.'

Fill in the 'Agency Name' and 'Federal ID Number' both of them are marked with required field indicators.

Select a 'Preferred Contact Method' from the dropdown, depending on what you select as the preferred method, determines what you need to add below. If you do not add a mail address if you select that as the contact method you will receive a validation error message.

Select an Agency type from the dropdown.

Click the 'Add New Address' button. The record will be added and be in edit mode. Select the 'Address Type' from the dropdown and fill in the rest of the information.

When complete, click the 'Update' button in the address block. If you do not click 'Update' you will receive an error if you try and save it first.

Click the 'Add Phone Number' button. Fill in the number and click the 'Update' button.

Click the 'Save' button. The information will be saved to the database and you will be transferred back the 'Agencies Search' screen.

**Eligible to Apply for Grants Checkbox:** This field indicates if the Agency can be an Applicant Agency for grants and utilize the system with the appropriate security data in place. Only Fiscal roles can enter and maintain these Agencies to ensure their data (name, address, etc) matches the legal data for contract purposes.

**Funding Agency Checkbox:** This field indicates if the Agency is a ‘Funding Agency’ and is used to populate a dropdown list in Portfolio Management. Default is unselected.

**Email Address Text Box:** This field is required if email is selected as the Preferred Contact Method.

**Agency Cleared Checkbox:** This indicator is primarily used as mechanism to prevent duplicate Agencies from being keyed into the system by External users. External users have the ability to add new Agencies into Contact Management if they do a search and can not find the correct agency name to be listed as a Recipient Agency (different than Applicant Agency). When an agency is added by an External user in this manner, the Agency is marked as Not Cleared. A system administrator must periodically search for uncleared Agencies and determine if they are unique to the system and can be marked as Cleared. If a duplicate is entered the administrator has the ability to search for the existing duplicate and Merge the 2 records into 1. This is initiated by the ‘Process as Duplicate’ button.

**Editing an Agency:**

From the ‘Main Menu’, click the ‘Contacts’ tab on the main menu. You will be transferred to the ‘Individuals Search’ page.

Click on the ‘Agencies’ link. This will transfer you to the ‘Agencies Search’ page.

Type the Agency name in the text box or any part of the agency address information that you might have to narrow the search.

Click the ‘Search’ button. Click the Agency name in the search results grid.



**Indiana Criminal Justice Institute**

System will time out at: 08:02:00 AM  
Remaining time: 18:35

Back Button will not take you back pages, instead use the application menus and controls.

Logoff

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audits](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

AGENCIES SEARCH

Search Criteria:

Agency Name:

Street Address:

City:

State:

County:

ZIP Code:

Agency Cleared?

Agency Name	Address Type	Street Address	City	Zip Code	County
<a href="#">Indiana Department of Correction</a>	Envelopes/Labels	302 E. Washington Street Room E334	Indianapolis	46204-2738	Adams
<a href="#">Indiana State Police</a>	Envelopes/Labels	100 North Senate Avenue Room N340, IGCN	Indianapolis	46204-2259	Marion
<a href="#">Indiana Criminal Justice Institute</a>	Envelopes/Labels	101 W Washington St # 1170	Indianapolis	46204-3411	Marion

You will be transferred to the Agency details page where the data can be edited.

**Egrants** Indiana Criminal Justice Institute (ICJI)

Back Button will not take you back pages, instead use the application menus and controls.

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audit](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

**AGENCY DETAILS**

[Process As Duplicate](#) | [View History](#) | [Save](#) | [Delete](#) | [Cancel](#)

Agency Name: \* Indiana State Police  
 Eligible to Apply for Grants: ☐  
 Federal ID Number:   
 Preferred Contact Method:  Work  
 Agency Type:  Government  
 DUNS Number: 824799597  
 Faith Based Agency: \*  Unknown  
 JURIS Number:  JURIS Non-Compliant  
 ORI Number:   
 Funding Agency:   
 Email Address:   
 Fiscal Year Ending (last day of):   
 Agency Cleared? ☐  
 US Congressional District: IN07 (EX PA02)

Last Update By: Mr. David Gin  
 Last Update Date: 11/4/2011 9:57:57 AM  
 Status:  Active

[Add New Address](#)

**Address List**

[Select](#) | [Delete](#) | Envelopes/Labels, Indiana State Police, Room N340, ICJI, 100 North Senate Avenue, Indianapolis, Marion, Indiana, 46204-2259, UNITED STATES

[Add Phone Number](#)

**Telephone Number Listing**

Location	Phone Number	Extension
Work	317-232-4338	
Fax	317-232-6932	

**Documents Received List**

[Add New Document](#)

Action	Type	Valid From Date	Valid To Date	Filed w/ Grant ID
<a href="#">Process As Duplicate</a>	<a href="#">View History</a>	<a href="#">Save</a>	<a href="#">Delete</a>	<a href="#">Cancel</a>

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## INDIVIDUAL

### Adding an Individual:

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

Type the search criteria into the fields of the 'Individuals Search' screen. Although you could search by 'State' or 'County' only it is best if you put as much information into the search criteria as you can to narrow down the number or records returned.

Click the 'Search' button. All of the records that match your criteria will be displayed in the grid. If there are many records you may sort the records by Last Name, First Name, Title, City or County by clicking on the column headings that are underlined.

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Back Button will not take you back pages, instead use the application menus and controls.

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audit](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

**INDIVIDUALS SEARCH**

Search Criteria:

Last Name:   
 First Name:   
 Title:   
 City:   
 State:  [All]  
 County:  [All]  
 ZIP Code:   
 Status:  [All]

[Search](#)

[Add New Individual](#)

<u>First Name</u>	<u>Last Name</u>	<u>Title</u>	<u>City</u>	<u>County</u>
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If the person you are searching for does not exist, click the ‘Add New Individual’ button. You will be transferred to the ‘Individuals Details’ page.

Type in the information for the individual you are adding.

If you click on any of these boxes with the 3 dots a popup window will display with valid choices for the text box. You may still type your own in the textbox these are the most common.

Make your selection in the box and then click the ‘Add To Value’ button. The value will be displayed in the ‘Return Value’ box. Click the ‘Save’ button and you will be transferred back to the ‘Individuals Details’ page and the value will be in the text box.

Click the 'Add New Address' button. Fill in the address information and click 'Update'.

Click the 'Add Phone Number' button. Fill in the phone number and click 'Update'

Click the 'Save' button to save the record to the database. You will be transferred to the 'Individuals Search' screen.

### Edit an Individual:

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

Enter the desired search criteria. Click the 'Search' button. Click the Individual name in the search results grid.

System will time out at: 03:15:51 AM.  
Remaining time: 19:54

Back Button will not take you back pages, instead use the application menus and controls.

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audits](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

**INDIVIDUALS SEARCH**

Search Criteria:

Last Name:

First Name:

Title:

City:

State:

County:

ZIP Code:

Status:

First Name	Last Name	Title	City	County
Neil	Mahon		Mechanicsburg	Adams
Mark	Massa	Executive Director	Indianapolis	Marion
Ryan	Miller			
Mary	Murdock	ICJ Deputy Director	Indianapolis	Marion

You will be transferred to the Individual details page where the data can be edited.



**Indiana**  
Criminal Justice Institute 

System will time out at: 09:19:59 AM.  
Remaining time: 19:28

Back Button will not take you back pages, instead use the application menus and controls.

Logoff

User Management | Funding Announcement | Project Management | Portfolio Management | Work Manager | Audits | Maintenance | **Contacts** | Reporting | External Menu

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

INDIVIDUALS DETAILS

View History | Save | Delete | Cancel

Courtesy Title:  ...

First Name:

Middle Initial/Name:

Last Name & Suffix:  ...

Title:  ...

Preferred Contact Method: \*

Email Address: \*

Default Address: \*

Last Update By: Mark, Massa

Last Update Date: 11/1/2011 9:44:18 AM

Status: \*

User Login ID

Terms Of Use Policy Signoff Date

mmassa

11/1/2011

Add New Address

Address Listing \*

Address Listing

Select | Delete

Envelopes/Labels , , , 101 W. Washington St. , Indianapolis , Marion , Indiana , 46204, UNITED STATES

Agency Address Listing

Add Phone Number

Telephone Number Listing\*

	Location	Phone Number	Extension	Agency Name	Remarks
<div>Select   Delete</div>	Work	317-232-7608			

Add Group | Leave Group

Current Group Membership

Select	Group
--------	-------

Add Agency | Leave Agency

Current Agency Membership

Select	Agency
--------	--------

View History | Save | Delete | Cancel

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Contact Management Quick Start Guide.doc rev. 11/7/11

Page 7 of 24

## GROUP

### Groups

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

The screenshot shows the 'Individuals Search' page in the Egrants system. The header includes the 'Egrants' logo, 'Indiana Criminal Justice Institute' text, and the 'IQI' logo. A system message in the top right corner states: 'System will time out at: 08:22:35 AM. Remaining time: 19:42'. Below the header, a navigation bar contains links for 'User Management', 'Funding Announcement', 'Project Management', 'Portfolio Management', 'Work Manager', 'Audits', 'Maintenance', 'Contacts' (highlighted), 'Reporting', and 'External Menu'. Below this, a secondary navigation bar shows 'Agencies', 'Individuals' (highlighted), 'Groups', and 'Extracts'. The main content area is titled 'INDIVIDUALS SEARCH'. It features a 'Search Criteria' section with input fields for 'Last Name', 'First Name', 'Title', 'City', 'State' (dropdown menu), 'County' (dropdown menu), 'ZIP Code', and 'Status' (dropdown menu). A 'Search' button is located to the right of these fields. Below the search criteria is an 'Add New Individual' button. At the bottom, a table header is visible with columns: 'First Name', 'Last Name', 'Title', 'City', and 'County'.

Click on the 'Groups' hyperlink. This will transfer you to the 'Groups Search' page.

Type in the desired search parameters and click the 'Search' button. The groups that match the criteria you entered will be displayed in the grid.

The screenshot shows the 'Groups Search' page in the Egrants system. The header is identical to the previous page. The system message in the top right corner now states: 'System will time out at: 08:24:59 AM. Remaining time: 18:41'. The navigation bar is the same, with 'Contacts' highlighted. The secondary navigation bar shows 'Agencies', 'Individuals', 'Groups' (highlighted), and 'Extracts'. The main content area is titled 'GROUPS SEARCH'. It features a 'Search Criteria' section with input fields for 'Group Name', 'Owner' (dropdown menu), and a 'Default Groups' checkbox. A 'Search' button is located to the right of these fields. Below the search criteria is an 'Add New Group' button. At the bottom, a table header is visible with columns: 'Group Name', 'Owner Name', and 'Short Description'.



Select the desired group by clicking the Group Name link. The Group Details pages will be displayed.

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System will time out at: 05:30:35 AM. Remaining time: 19:30

Back Button will not take you back pages, instead use the application menus and controls.

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audits](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

**GROUPS DETAILS**

[View History](#) [Save](#) [Delete](#) [Cancel](#)

Group Name: \*  Last Update By: Last Update Date:

Owner: \*

Default Group: ☐

Short Description:

Users Granted Group Maintenance Permissions

User Name:  [Add User](#)

User Name	
Ms Terrie D Grantham	<a href="#">Remove User</a>

**Owning Group(s)** [Add Owner](#) [Remove Selected Group](#)

Select	Group Name	Owner Name
--------	------------	------------

**Subordinate Group(s)** [Add Sub](#) [Remove Selected Sub](#)

Select	Group Name	Owner Name
--------	------------	------------

**Individual Group Members** [Add Individuals](#) [Remove Selected Individuals](#)

Select	Name	County	Title
--------	------	--------	-------

**Current Agency Membership** [Add Agency](#) [Remove Selected Agency](#)

Select	Agency
--------	--------

[View History](#) [Save](#) [Delete](#) [Cancel](#)

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## Add Owning Groups

Click on the 'Add Owner' button below the 'Owning Groups Name' label'. You will be transferred to the 'Group Selection' screen. Here you will search for the group that you wish to be the owning group of the one you are currently working with. Enter your criteria to find the group and click 'Search'.

Select which group you want to be the owner and check the 'Select' box next to the group(s) and then click the 'Add Selected Groups' button above the grid.

**Egrants** Indiana Criminal Justice Institute **ICJI**

System will time out at: 05:45:27 AM. Remaining time: 18:51

Back Button will not take you back pages, instead use the application menus and controls.

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audits](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

**GROUP SELECTION**

Search Criteria:

Group Name:

Owner:

Default Groups: ☐

[Search](#)

[Add Selected Groups](#)

[Select All](#)

select	Group Name	Owner Name	Short Description
<input checked="" type="checkbox"/>	County Commissioners - County Seat	Mike Scorsio2	

[Cancel](#)

**Note:** Due to the lack of data currently in our system, the screenshots covering Groups will be taken from a similar Egrants application used by the State of Pennsylvania.

You will be transferred back to the ‘Groups Details’ page and the group you selected will be listed as an ‘Owning Group’

User ManagementFunding AnnouncementProject ManagementPortfolio ManagementWork ManagerAuditsMaintenanceContactsExternal Menu

AgenciesIndividualsGroupsExtracts

GROUPS DETAILS

Group Name: \*County Commissioners

Owner: \*Super User

Default Group: ☐

Short Description:

Users Granted Group Maintenance Permissions

User Name: External FiscalReadAdd User

User Name

Last Update By: Super User

Last Update Date: 5/16/2005 1:54:30 PM

Add OwnerRemove Selected Group

Add SubRemove Selected Sub

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

Select	Group Name	Owner Name
--------	------------	------------

Add IndividualsRemove Selected Individuals

Add AgencyRemove Selected Agency

Select	Name	County	Title
--------	------	--------	-------

Select	Agency
--------	--------

SaveDeleteView HistoryCancel

The user adding the Owning Group, must also have read write access to the owning group.

Delete Owning Groups

Check the box next to the ‘Owning Group’ that you wish to remove. Click the ‘Remove Selected Groups’ button above the grid. You will receive a confirmation box.

Back Button will not take you back pages, instead use the application menus and controls

User ManagementFunding AnnouncementProject ManagementPortfolio ManagementWork ManagerAuditsMaintenanceContactsExternal Menu

AgenciesIndividualsGroupsExtracts

GROUPS DETAILS

Group Name: \*County Commissioners

Owner: \*Super User

Default Group: ☐

Short Description:

Users Granted Group Maintenance Permissions

User Name: External FiscalReadAdd User

User Name

Last Update By: Super User

Last Update Date: 5/16/2005 1:54:30 PM

Add OwnerRemove Selected Group

Add SubRemove Selected Sub

Select	Group Name	Owner Name
<input checked="" type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

Select	Group Name	Owner Name
--------	------------	------------

Add IndividualsRemove Selected Individuals

Add AgencyRemove Selected Agency

Select	Name	County	Title
--------	------	--------	-------

Select	Agency
--------	--------

SaveDeleteView HistoryCancel

Click 'OK' if you wish to delete the group, 'Cancel' if you wish to leave the group unchanged.

## Add Sub Groups

To add subordinate groups, click the 'Add Sub' button. You will be transferred to the 'Group Selection' page.

Back Button will not take you back pages, instead use the application menus and controls.

User Management Funding Announcement Project Management Portfolio Management Work Manager Audits Maintenance **Contacts** External Menu

Agencies Individuals **Groups** Extracts

**GROUPS DETAILS**

Group Name: \* County Commissioners  
Owner: \* Super User  
Default Group: ☐  
Short Description:

Last Update By: Super User  
Last Update Date: 5/16/2005 1:54:30 PM

Users Granted Group Maintenance Permissions  
User Name: External FiscalRead

**Owning Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

**Subordinate Group(s)**

**Individual Group Members**

Select	Name	County	Title
--------	------	--------	-------

**Current Agency Membership**

Select	Agency
--------	--------

Enter the information for the search criteria and click Search. Select the row of the group that you wish to add by checking the checkbox in the select column.

Click the 'Add Selected Groups'. You will be transferred back to the 'Groups Details' page and the group you just added will be displayed in the 'Subordinate Group' grid.

User Management Funding Announcement Project Management Portfolio Management Work Manager Audits Maintenance **Contacts** External Menu

Agencies Individuals **Groups** Extracts

**GROUPS DETAILS**

Group Name: \* County Commissioners  
Owner: \* Super User  
Default Group: ☐  
Short Description:

Last Update By: Mike Scordo2  
Last Update Date: 5/16/2005 2:09:37 PM

Users Granted Group Maintenance Permissions  
User Name: External FiscalRead

**Owning Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

**Subordinate Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners Subordinate Group	Mike Scordo2

**Individual Group Members**

Select	Name	County	Title
--------	------	--------	-------

**Current Agency Membership**

Select	Agency
--------	--------

## Delete Sub Groups

Select the group or groups that you wish to delete as subordinate groups by checking the select checkbox. When you have them all selected, click the 'Remove Selected Sub'.

The screenshot shows the 'GROUPS DETAILS' page for the 'County Commissioners' group. The 'Subordinate Group(s)' table has one row selected, indicated by a blue arrow pointing to the 'Select' checkbox.

Select	Group Name	Owner Name
<input checked="" type="checkbox"/>	County Commissioners Subordinate Group	Mike Scordo2

A confirmation dialog box will be displayed. Click the 'OK' button if you wish to remove the records, 'Cancel' if you want to leave it there.

## Add Individual Group Members

Click the 'Add Individuals' button. You will be transferred to the 'Group Individuals Search' page.

The screenshot shows the 'GROUPS DETAILS' page for the 'County Commissioners' group. The 'Add Individuals' button is highlighted with a blue arrow.

Select	Name	County	Title
--------	------	--------	-------

Enter the search criteria and click the ‘Search’ button.

Click the checkboxes in the select column for the records that you wish to add. Click the ‘Add Selected Individuals’ button.


Back Button will not take you back pages, instead use the application menus and controls.

User Management Funding Announcement Project Management Portfolio Management Work Manager Audits Maintenance **Contacts** External Menu

[Agencies](#) [Individuals](#) **Groups** [Extracts](#)

GROUP INDIVIDUALS SEARCH

Search Criteria:

Last Name:  

First Name:


Title:


City:

State:

County:

Zip Code:



Select	First Name	Last Name	Title	City	County
<input checked="" type="checkbox"/> 	External	User		Harrisburg	
<input checked="" type="checkbox"/>	Super	User		321	
<input type="checkbox"/>	External	User Manager		Anaheim	
<input type="checkbox"/>	External	User Manager		Hollywood	

You will be returned to the ‘Groups Details’ page. The name you selected on the previous page will be displayed in the grid. Click the ‘Save’ button to save changes.

User Management Funding Announcement Project Management Portfolio Management Work Manager Audits Maintenance **Contacts** External Menu

[Agencies](#) [Individuals](#) **Groups** [Extracts](#)

GROUPS DETAILS

Group Name:  Last Update By: Mike Scordo2  
Owner:  Last Update Date: 5/16/2005 2:21:50 PM

Default Group:

Short Description:

Users Granted Group Maintenance Permissions

User Name:

**Owning Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

**Subordinate Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners Subordinate Group	Mike Scordo2

**Individual Group Members**

Select	Name	County	Title
<input type="checkbox"/>	External User		
<input type="checkbox"/>	Super User		

**Current Agency Membership**

Select	Agency
--------	--------

## Delete Individual Group Members

Use the checkboxes to select the individual members that you wish to delete.

Click the 'Remove Selected Individuals' button. A delete confirmation dialog box will be displayed. Click 'OK' if you want to delete the individual, 'cancel' if you want to leave it.

**GROUPS DETAILS**

Group Name: \* County Commissioners  
Owner: \* Super User  
Default Group: ☐  
Short Description:

Last Update By: Mike Scordo2  
Last Update Date: 5/16/2005 2:21:50 PM

Users Granted Group Maintenance Permissions  
User Name: External FiscalRead

**Owning Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

**Subordinate Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners Subordinate Group	Mike Scordo2

**Individual Group Members**

Select	Name	County	Title
<input type="checkbox"/>	External User		
<input checked="" type="checkbox"/>	Super User		

**Current Agency Membership**

Select	Agency
--------	--------

## Add Agency Membership

Click the 'Add Agency' button. You will be transferred to the 'Groups Agency Search' page.

Type in search criteria and click the 'Search' button.

**GROUPS DETAILS**

Group Name: \* County Commissioners  
Owner: \* Super User  
Default Group: ☐  
Short Description:

Last Update By: Mike Scordo2  
Last Update Date: 5/16/2005 2:21:50 PM

Users Granted Group Maintenance Permissions  
User Name: External FiscalRead

**Owning Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

**Subordinate Group(s)**

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners Subordinate Group	Mike Scordo2

**Individual Group Members**

Select	Name	County	Title
<input type="checkbox"/>	External User		
<input type="checkbox"/>	Super User		

**Current Agency Membership**

Select	Agency
--------	--------

Click the checkboxes in the select column for the records that you wish to add. Click the ‘Add Selected Agencies’ button.

Back Button will not take you back pages, instead use the application menus and controls.

User Management Funding Announcement Project Management Portfolio Management Work Manager Audits Maintenance **Contacts** External Menu

[Agencies](#) [Individuals](#) **Groups** [Extracts](#)

GROUPS AGENCY SEARCH

Search Criteria:

Agency Name:

Street Address:

City:

State:

County:

Zip Code:

Select	Agency Name	Street Address	City	County
<input checked="" type="checkbox"/>	<a href="#">Test Eligible Applicant Agency</a>	Test	Hollywood	

You will be returned to the ‘Groups Details’ page. The Agency you selected on the previous page will be displayed in the grid.

User Management Funding Announcement Project Management Portfolio Management Work Manager Audits Maintenance **Contacts** External Menu

[Agencies](#) [Individuals](#) **Groups** [Extracts](#)

GROUPS DETAILS

Group Name:

Owner:

Default Group: ☐

Short Description:

Users Granted Group Maintenance Permissions

User Name:

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners - Owning Group	Mike Scordo2

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners Subordinate Group	Mike Scordo2

Select	Name	County	Title
<input type="checkbox"/>	External User		
<input type="checkbox"/>	Super User		

Select	Agency
<input type="checkbox"/>	<a href="#">Test Eligible Applicant Agency</a>

Click the ‘Save’ button to commit the changes.

## Delete Agency Membership

Use the checkboxes to select the Agencies you wish to remove from the group.

Click the 'Remove Selected Agency' button.

The screenshot shows the 'GROUPS DETAILS' page for the 'County Commissioners' group. The 'Current Agency Membership' section has a table with one row: 'Test Eligible Applicant Agency' with a checked checkbox. A blue arrow points to the 'Remove Selected Agency' button.

Select	Agency
<input checked="" type="checkbox"/>	Test Eligible Applicant Agency

A confirmation box will be displayed. Click the 'OK' button if you wish to delete the record or 'Cancel' if you wish to leave the record.

## Delete a Group

Click the 'Delete' button. A delete confirmation box will be displayed. Click the 'OK' button if you wish to delete it, 'Cancel' if you want to leave it. You will be returned to the 'Group Search' page.

The screenshot shows the 'GROUPS DETAILS' page for the 'County Commissioners - Owning Group'. The 'Delete' button at the bottom is highlighted with a blue arrow.

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners	Super User



When a group is deleted it is all removed from all other groups where the Owning or Subordinate group relationship had been build.

## Maintaining Write Access to Groups

Users Granted Group Maintenance Permissions is how additional users can be given access to maintain the group. By default, the group owner has this ability, plus has the security clearance to grant maintenance permissions to other users.

To add users pick the desired user name in the drop down and click the Add User button.

The screenshot shows the 'GROUPS DETAILS' page for the 'County Commissioners - Owning Group'. The 'Users Granted Group Maintenance Permissions' section is active, showing a dropdown menu for 'User Name' with 'External FiscalRead' selected. A blue arrow points to the 'Add User' button next to the dropdown. Below this is a table with one row: 'Super User' with a 'Remove User' button. Other sections include 'Owning Group(s)', 'Subordinate Group(s)', 'Individual Group Members', and 'Current Agency Membership', each with their respective tables and buttons. At the bottom are 'Save', 'Delete', 'View History', and 'Cancel' buttons.

Select	Group Name	Owner Name
<input type="checkbox"/>	County Commissioners	Super User

Select	Name	County	Title
--------	------	--------	-------

Select	Agency
--------	--------

In order to remove a user from the maintenance list, click the 'Remove User' button next to the person you wish to remove from having access.

A confirmation dialog box will be displayed. Click 'OK' if you wish to remove this user, 'Cancel' if you want to leave it.

The user will be removed from the grid.

This screenshot is identical to the previous one, but the blue arrow now points to the 'Remove User' button next to the 'Super User' entry in the 'Users Granted Group Maintenance Permissions' table.

Click the 'Save' button at the bottom of the page to save the records, you will be returned to the 'Groups Search' page.

## EXTRACT

Extracts allows the user to select Individuals, Groups, Agencies and Agency Contacts to be included in the creation of data file including address information, which can be used for generating labels or an extract for use in a mail merge.


### Add an Individual

From the **Main Menu**, click the **Contacts** tab on the main menu. You will be transferred to the **Individuals Search** page.


Click on the **Extract** hyperlink. This will transfer you to the **Extracts Recipients List** page.

Click the **Add Individual** button. You will be transferred to the **Extract Select Individuals** page. Enter the search criteria for the individual that you would like to add and click the 'Search' button. The records that match the criteria you entered will be displayed in the grid.


Click the checkboxes next to the individuals that you wish to add. Click the 'Add Selected Individuals' button.



**Egrants**



**Indiana Criminal Justice Institute**



System will time out at: 09:28:25 AM  
Remaining time: 19:30

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Logoff

[User Management](#) | 
 [Funding Announcement](#) | 
 [Project Management](#) | 
 [Portfolio Management](#) | 
 [Work Manager](#) | 
 [Audits](#) | 
 [Maintenance](#) | 
 [Contacts](#) | 
 [Reporting](#) | 
 [External Menu](#)

[Agencies](#) | 
 [Individuals](#) | 
 [Groups](#) | 
 [Extracts](#)

EXTRACTS SELECT INDIVIDUALS

Search Criteria:

Last Name:

First Name:

Title:

City:

County:

Zip Code:

Individual Record Status:

Search

Add Selected Individuals

Select All

Select	First Name	Last Name	Title	City	County Name
<input type="checkbox"/>	Judy	Smith		Indianapolis	Marion
<input type="checkbox"/>	John	Day	CEO	Indianapolis	Marion
<input type="checkbox"/>	Neil	Mahon		Mechanicsburg	Adams
<input type="checkbox"/>	Barry	Reber	CAI Business Analyst	Indianapolis	Marion
<input type="checkbox"/>	Dan	Jeffries	Traffic Safety	Indianapolis	Marion
<input type="checkbox"/>	David	Gin	Help Desk Support	Indianapolis	Marion
<input type="checkbox"/>	David	Stewart	General Counsel	Indianapolis	Marion
<input type="checkbox"/>	Joseph	Fistrovich	Finance Staff	Indianapolis	Marion
<input type="checkbox"/>	Joshua	Ross	Research Division Director	Indianapolis	Marion
<input type="checkbox"/>	Test	Test		Indianapolis	Marion
<input type="checkbox"/>	Terrie	Grantham	Program Manager	Indianapolis	Marion
<input type="checkbox"/>	Amanda	Alvey	Traffic Safety Program Manager	Indianapolis	Marion
<input type="checkbox"/>	Ashley	Barnett	Youth Division Director	Indianapolis	Marion
<input type="checkbox"/>	Beth	Hampshire	Drug and Crime Program Manager	Indianapolis	Marion
<input type="checkbox"/>	Christy	Huston	Victims Services Program Manager	Indianapolis	Marion
<input type="checkbox"/>	Deirdre	Westrate	Victims Assistance Program Staff	Indianapolis	Marion
<input type="checkbox"/>	Diane	Kelly	IT ProjectManager	Indianapolis	Marion
<input type="checkbox"/>	Kim	Snyder	Youth Division Program Manager	Indianapolis	Marion
<input type="checkbox"/>	Leann	Walton	Finance	Indianapolis	Marion
<input type="checkbox"/>	Mary	Murdock	ICJ Deputy Director	Indianapolis	Marion

Cancel

Please send technical comments and problems to [ICJI EGRANTS Support \(QA\)](#).  
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You will be returned to the 'Extracts Select Individuals' page and the record you selected will be displayed in the grid.

Contact Management Quick Start Guide.doc rev. 11/7/11

Page 19 of 24

## Add a Group

Click the 'Add Group' button. You will be transferred to the 'Extracts Select Groups' page.

Enter the search criteria for the group that you would like to add and click the 'Search' button. The records that match the criteria you entered will be displayed in the grid.

Click the checkboxes next to the groups that you wish to add. Click the 'Add Selected Groups' button.

The screenshot shows the 'Extracts Select Groups' page within the Egrants system. The header includes the 'Egrants' logo, the Indiana Criminal Justice Institute (ICJI) logo, and a system status message: 'System will time out at: 09:34:49 AM. Remaining time: 19:39'. A navigation bar contains links for User Management, Funding Announcement, Project Management, Portfolio Management, Work Manager, Audits, Maintenance, Contacts, Reporting, and External Menu. Below the navigation bar, the page title 'EXTRACTS SELECT GROUPS' is displayed. The search criteria section includes a 'Group Name' text box, an 'Owner' dropdown menu, and a 'Default Groups' checkbox. A 'Search' button is located to the right of the search criteria. Below the search criteria, there is an 'Add Selected Groups' button. At the bottom left, there is a 'Select All' button. The main content area features a table with the following headers: 'select', 'Group Name', 'Owner Name', and 'Short Description'. A 'Cancel' button is located at the bottom center of the page.

System will time out at: 09:34:49 AM.  
Remaining time: 19:39

Back Button will not take you back pages, instead use the application menus and controls.

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audits](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

EXTRACTS SELECT GROUPS

Search Criteria:

Group Name:

Owner:

Default Groups: ☐

select	Group Name	Owner Name	Short Description
--------	------------	------------	-------------------

You will be returned to the 'Extracts Recipient List' page and the record you selected will be displayed in the grid.

## Add Agency

Click the 'Add Agency' button. You will be transferred to the 'Extracts Select Agency' page.

Enter the search criteria for the agency that you would like to add and click the 'Search' button. The records that match the criteria you entered will be displayed in the grid.

Click the checkboxes next to the agency that you wish to add. Click the 'Add Selected Agencies' button.

System will time out at: 09:38:12 AM.  
Remaining time: 19:44

Back Button will not take you back pages, instead use the application menus and controls.

Logoff

User Management | Funding Announcement | Project Management | Portfolio Management | Work Manager | Audits | Maintenance | **Contacts** | Reporting | External Menu

AgenciesIndividualsGroupsExtracts

EXTRACTS SELECT AGENCY

Search Criteria:

Agency Name: %  
City:  
Address:  
County:

Search

Add Selected Agencies

Select All

Select	Agency Name	Address	City	County
<input type="checkbox"/>	Blackford County Sheriffs Office	0064 North 500 E	Hartford City	Blackford
<input type="checkbox"/>	National Highway Traffic Safety Administration	1200 New Jersey Avenue	Washington	
<input type="checkbox"/>	Indiana Criminal Justice Institute	101 W Washington St	Indianapolis	Marion
<input type="checkbox"/>	US Department of Justice	444 Fed Dr	Indianapolis	Marion
<input type="checkbox"/>	XYZ	1234 E. State St	Indianapolis	Marion
<input type="checkbox"/>	YWCA of Greater Indianapolis	1101 Market Street	Indianapolis	Marion

Cancel

You will be returned to the 'Extracts Recipients List' page and the record or records you selected will be displayed in the grid.

## Add Agency Contact

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

Click on the 'Extract' hyperlink. This will transfer you to the 'Extracts Recipients List' page.

Click the 'Add Agency Contact' button. You will be transferred to the 'Extracts Select Agency Contact' page.

Enter the search criteria for the agency that you would like to add and click the 'Search' button. The records that match the criteria you entered will be displayed in the grid. This example is using 'County' as the search criteria.

Click the checkboxes next to the agency contacts that you wish to add.

Click the 'Add Selected Contacts' button.

You will be returned to the 'Extracts Recipients List' page and the record or records you selected will be displayed in the grid.

Back Button will not take you back pages, instead use the application menus and controls.

System will time out at: 09:40:45 AM. Remaining time: 19:44

**Egrants** Indiana Criminal Justice Institute **ICJI**

[User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Portfolio Management](#) | [Work Manager](#) | [Audits](#) | [Maintenance](#) | [Contacts](#) | [Reporting](#) | [External Menu](#)

[Agencies](#) | [Individuals](#) | [Groups](#) | [Extracts](#)

EXTRACTS SELECT AGENCY CONTACTS

Search Criteria:

Agency Name:

Funding Source:

Funding Stream Year:

Project End Date (Start):  (End):

Funding Announcement:

Project Role:

Project Status:

County:

Grant ID:

Select	Name	Agency Name	Role	Grant ID	Project End Date	City	County
<input type="checkbox"/>	Ms. Susan Knoebel	Clark County Government	Contact	1001	12/31/2012	Jeffersonville	Clark
<input type="checkbox"/>	Ms. Susan Knoebel	Clark County Government	Project Director	1001	12/31/2012	Jeffersonville	Clark
<input type="checkbox"/>	Mr. Monty Snelling	Clark County Government	Financial Officer	1001	12/31/2012	Jeffersonville	Clark

## Generating an Output File

Once a list has been built by selecting the desired Individuals, Groups, Agencies and Agency Contacts, you will be able to produce an output file with a few options.

System will time out at: 09:43:47 AM.  
Remaining time: 18:07

Back Button will not take you back pages, instead use the application menus and controls.

Logoff

User Management | Funding Announcement | Project Management | Portfolio Management | Work Manager | Audits | Maintenance | **Contacts** | Reporting | External Menu

AgenciesIndividualsGroupsExtracts

EXTRACTS RECIPIENTS LIST

Add Individual Add Group Add Agency Add Agency Contacts Add Award Letter Contacts Remove Selected Rows

Select All

Select	Type	Name	Grant ID	City	County
<input type="checkbox"/>	Agency Contact	Mr. Monty Snelling	1001		
<input type="checkbox"/>	Agency Contact	Ms. Susan Knoebel	1001		

Extract Template: Mail Merge  
Mailroom Comment: Mail Merge  
Extract Options: HTML, Email Addresses, Labels, Mail Room, Rejection Letter  
☐ Remove punctuation ☐ Remove prefix with suffix

Process Extract Cancel

## Extract File

There are six possible extract selections: Mail Merge file, HTML file, Email Addresses, Labels, Mail Room or Rejection Letter extract. They are selected using the dropdown.

Once you have made your select click the 'ProcessExtract' button. You will see a display at the top of the page showing a clock and a message that 'File extraction in progress. Please wait...'

A new window will open with a dialog box asking if you wish to open the file, save it, cancel or more info. This example will save the file.

A dialog box will be displayed asking to 'Save As' file name and directory.

Enter the information and click 'Save' When the download is complete you will need to click the 'Close' button on the dialog.

This output file can be used as a mail merge file when producing letters / mailings with MS Word.

## Format Labels

Clicking this will generate a report that can be printed locally. Labels include multiple recipients and addresses on each page.

The file needs to be saved to a specific folder on your machine (currently c:\\Contacts\_Label\_Data\\extracts.txt) so when the file

\_Contacts\_LABELS\_NORMAL1.dot is opened it loads the extract data and the result can be

printed on labels.

### **Create Envelopes**

Clicking this will generate a report that can be printed locally. Envelopes include only one recipient and address on each page.

Click the 'Create Envelopes' button. A 'File Download' (click link to view) dialog box will be displayed and you need to 'Open' the file or 'Save' it to your pc. The file name will already be filled in as exportFile.txt